United Nations
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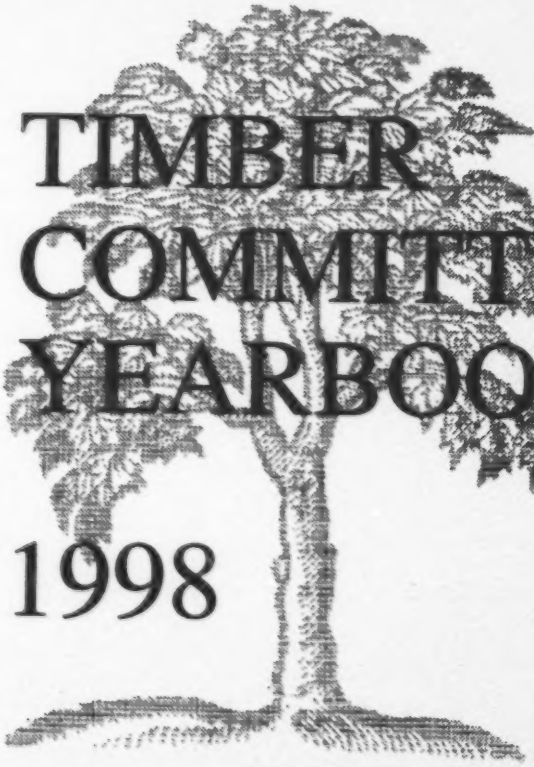
TIMBER AND FOREST INFORMATION SERIES

TIMBER COMMITTEE YEARBOOK



1998

UNITED NATIONS

United Nations Economic Commission for Europe
Food and Agriculture Organization of the United Nations

Timber Section
Geneva, Switzerland

TIMBER AND FOREST INFORMATION SERIES

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New York and Geneva, 1998

NOTE

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ABSTRACT

The UN-ECE Timber Committee Yearbook 1998 contains an overview of the Committee's activities and bibliographical references for its publications. The Committee's activities include broadly: contributing to follow-up to UNCED and the pan European Ministerial Conference for the Protection of Forests; its annual session as well as those of its subsidiary bodies and teams of specialists; collection and analysis of statistics on forest products, forest products markets and forest resources; promotion of sustainable forestry; and, assistance to countries in transition in central and eastern Europe.

THE UN/ECE TIMBER COMMITTEE YEARBOOK 1998

Table of contents

Preface iv

I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1997:

1. Promotion of sustainable forest management in the region 1
2. Markets for certified forest products 1
3. Baltic countries forest and forest industry study tour 2
4. Forest Resource Assessment 2000 - Temperate and Boreal Zones 2
5. Assistance to countries in transition of central and eastern Europe 3
   - Workshops organised in 1997
6. Forest products markets 4
7. Forest Economics and Statistics 5
8. Forest Technology, Management and Training 5
9. Social Elements of Sustainable Forest Management in Europe 6
10. Recycling, energy and market interactions 7
11. Public relations in the forest and forest industries sector 7

II. ACTIVITIES PLANNED FOR 1998 AND 1999 8

III. BIBLIOGRAPHICAL REFERENCES 11

IV. LIST OF MEETINGS IN 1998 AND 1999 14

Some facts about the Timber Committee 15
UN-ECE/FAO Timber Section publications 16

PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* can not be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

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I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1997

1. Promotion of sustainable forest management in the region

The Committee's entire programme is devoted in priority to promoting sustainable forest management in the region, notably by providing high quality, policy relevant, information to support the international forest debate, and by providing a forum for international cooperation. The Committee also provides technical support to international political processes aimed at promoting sustainable forest management, notably the pan-European process and the Intergovernmental Forum (formerly Panel) on Forests, part of the follow up to the 1992 Rio Conference on Environment and Development (UNCED).

The Committee's main contributions, described in more detail elsewhere, are:

- data on quantitative indicators of sustainable forest management for the Lisbon Ministerial Conference in June 1998 (see 4. below)
- report on forestry assistance to countries in transition, as requested by the Helsinki Ministerial Conference, 1993 (see 5. below)
- report on socio-economic aspects of forestry, to prepare the discussion for the Lisbon conference (see 9. below)
- outlook for long term supply and demand of timber and forest products (essential for evaluating the long term sustainability of the wood supply function of the forest)
- regular statistics and analysis on production, trade and markets for monitoring short term developments (see 6. below)
- improvement of public information on forestry and the forest sector (see 11. below)
- analysis of issues connected to recycling, energy and new markets for forest products (see 10. below)
- markets for products certified as having come from sustainably managed forests (see 2. below)

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2. Markets for certified forest products

As the special topic of the October 1997 Session, the Timber Committee discussed the markets for certified forest products. The market situation for certified forest products appears to be the same as reported in last year's *Review*, ie a few importers and vendors are requesting that their wood products be sourced from sustainably managed forests and so labelled. On a global scale, the volume of certified forest products is negligible because of lack of significant demand by consumers who will indeed pay for the additional costs incurred in providing certified forest products. Until companies succeed through effective promotion in educating consumers about certification of SFM and in creating true demand for certified forest products, the niche will remain limited, especially if certified products are not widely available.

The former ECE/FAO team of specialists on certification reported that there are a growing number of schemes (public and private) being developed worldwide although mutual acceptance of each others schemes by the marketplace is not assured. In addition the team highlighted a number of important, yet difficult issues in establishing credible certification systems, such as an accurate accounting of chain of custody. Still the team was unable to assess the market for certified forest products although they indicated that the present small market niche could grow, depending upon the availability and credibility of certified wood and wood-based products. The team's recommendation that a workshop on certification of sustainable forest management be conducted for countries in transition is now scheduled for 23-25 August 1998 in Prague, Czech Republic. For more information on the workshop please contact the secretariat and watch the Timber Committee website.

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3. Baltic countries forest and forest industry study tour

At the invitation of the governments of Estonia, Latvia and Lithuania, the UN-ECE Timber Committee visited forests and forest industries in the three countries, from Tallinn to Vilnius, some 700 kilometres, from 4 to 9 May 1997. In the last 5 years these countries have made considerable progress in their forest management, forest products processing and forest products exports. Participants observed the current state of the sector and discussed all aspects of forest resources and their utilization with experts from each country. The tour included examples of both traditional, state-owned industries, and new private enterprises. In addition participants witnessed the beauty of these countries and discovered their fascinating individual cultures.

The hosts of the study tour are once again commended for the outstanding organization and their impeccable hospitality!

The next study tour will be joint Timber Committee and FAO European Forestry Commission and will visit both Finnish and Russian Karelia in conjunction with the EFC Session in October 1998 in Lahti, Finland. Additional information will be available from the secretariat and on the Timber Committee website as it develops.

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4. Forest Resource Assessment 2000 - Temperate and Boreal Zones

The Temperate and Boreal Forest Resources Assessment 2000 (TBFRA-2000) in 1997 moved from its preparatory to the implementation stage. The team of specialists (ToS) on TBFRA-2000 meeting held in March 1997 in Birmensdorf (Switzerland), reviewed the assessment's draft enquiry and provided practical recommendations. The balance between ambitious demands for information and the possibilities for data collection was the focus of the team's attention. The ToS concluded that the draft TBFRA-2000 enquiry was a challenging but a reasonable attempt to obtain the best possible information on forest resources. The questions were found both relevant and well formulated. In comparison with the previous assessments, the improvements in the type of data requested from countries was noted. While the TBFRA-2000 is an ambitious project, the enquiry should provide the means to implement the assessment successfully.

The twenty-first session of the Joint FAO/ECE Working Party (May 1997, Geneva) reviewed the draft TBFRA-2000 enquiry and advised the secretariat on how it should be improved and finalised. The Working Party noted the high ambitions of the enquiry to collect a comprehensive set of data, which would meet higher expectations of the international forest community as regards information on the forest resource. It was noted that such this ambition had generated new topics, new approaches and new partnerships, and new risks as well.

The enquiry was finalised on the basis of the ToS and the Working Party session recommendations and sent in August - September 1997 to the national correspondents of the 55 participating countries for the implementation and reply to the ECE/FAO secretariat.

Two important meetings were held in October - November 1997 with the main objectives to brief the TBFRA-2000 national correspondents on objectives, methods, concepts of the Assessment and practical issues of the implementation of the enquiry, as well as sharing the experience in preparing national replies:

- the UN-ECE/FAO workshop on "Temperate and Boreal Forest Resources Assessment 2000 and Criteria and Indicators for Sustainable Forest Management" for the specific needs of the countries of central and eastern Europe in transition to market economy (see 5 below);
- the *ad hoc* meeting of TBFRA-2000 national correspondents held in Geneva in November 1997.

Both meetings appeared to be important mile-stones on the way of the Assessment 2000 preparation. Their results were found vital to obtain the best possible forest resources information from countries. In fact the national correspondents provided their commitments to the task. The participants confirmed their willingness to cooperate on the project and to provide the best possible information on the forest resources of their countries.

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5. Assistance to countries in transition of central and eastern Europe

The cooperation with countries in transition of central and eastern Europe (CITs) is a priority area of the UN/ECE Timber Committee and the FAO European Forestry programmes of work. The twenty-first session of the Joint ECE/FAO Working Party on Forest Economics and Statistics (May 1997) confirmed its position of promoting the process of economic reform and transition to a market economy in the CITs. It noted, in particular, that topics and themes in the programme of assistance should be in line with the priorities and needs as seen by countries themselves.

The fifty-fifth session of the UN/ECE Timber Committee (October 1997) examined and endorsed the activities carried out and planned in support of CITs in the forest and forest products sector, specifically the programme of assistance which consisted mainly in the organisation of workshops and monitoring of the implementation of the resolution H3 of the Ministerial Conference on the Protection of Forests in Europe.

The Team of Specialists (ToS) to monitor and develop assistance to countries of central and eastern Europe in transition in the forest and forest products sector met in Ljubljana, Slovenia, in November 1997. The ToS reviewed in detail developments in the CITs' area, including H3 implementation, programme of workshops, partnerships and cooperation with training institutions. The potential cooperation with other international organizations working on the CITs issues, including EU/PHARE and TACIS assistance programmes were explored. The ToS recommended the organizers of seminars, courses and workshops to take particularly into account the improvement of conditions to develop investments in the forestry, timber and woodworking industries sectors in CITs. Joint research projects in this area would be extremely useful and helpful.

The Steering Committee of the Joint ECE/FAO/ILO Committee (June 1997) noted that the team of specialists on problems in the forest and forest industry sector arising from radiation contamination, particularly from the Chernobyl disaster (activities closely related to CITs problems) had already identified the main issues, and the main needs for assistance. The need now was for resources, on a quite a large scale, which neither ECE nor FAO were in a position to provide. The team's work had stimulated interest from funding organisations, including EBRD, DHA and the World Bank, in forest/radiation issues and thus was very useful.

- Other activities on CITs

The ECE/FAO secretariat continued to act as the international coordinator for the implementation of resolution H3 and prepared the Second Interim Report on the H3 implementation. The ToS meeting reviewed the report and considered how to improve the H3 database, its maintenance and use, for both countries in transition as well as for developing future activities at the national and international level.

Several country profiles on the forestry and forest product sectors of CITs are published each year, depending on the resources available. The most recent were the country profiles on Armenia, Republic of Moldova and the Russian Federation. The forestry country profile of Kazakhstan is currently under preparation.

Workshops for countries in transition organised in 1997

New trends in thinnings
September 1997, Zvolen, Slovakia

The workshop was organised by the Forest Research Institute of Zvolen in cooperation with the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training. The ways of reconciling management objectives and economic constraints were discussed. The participants of the workshop exchanged information and experience on modern thinning concepts, harvesting systems for sawlogs, industrial wood and wood for energy. Particular emphasis was attached to cost and environmental aspects and to ergonomics, safety and training.

Temperate and Boreal Forest Resources Assessment 2000 and criteria and indicators for sustainable forest management
October 1997, Gmünden, Austria

The UN-ECE/FAO workshop was organized for the specific needs of the countries of central and eastern Europe in transition to market economy and was related to the activities described under 4 above. It was sponsored by the Government of Austria through the Federal Ministry of Agriculture and Forestry and the European Commission.

Development of marketing of sawnwood and value-added forest products
November 1997, Arkhangelsk, Russian Federation

The third in a series of Timber Committee marketing workshops in countries in transition was held in November 1998 in Arkhangelsk, Russian Federation. At the invitation of the general director of one of the region's large exporting companies, the city of Arkhangelsk was chosen for the workshop site because it is a centre for the Russian sawmilling industry. The workshop was hosted by the Arkhangelsk Regional Administration and the Arkhangelsk State Engineering University and sponsored by the Finnish Ministry of Agriculture and Forestry.

Beginning with broad introductions into sawnwood trade and trade policies, the workshop focused on the marketing function and its relation to processing functions. Topics included market research, quality control, adding value to sawnwood, the role of trade associations, etc. Special topics were included like the effect of certification of sustainable forest management and research and education in marketing of forest products.

Following an invitation from the Belarus government, the next forest products marketing workshop is scheduled for autumn 1998 in Minsk. More information is available through the secretariat or from the Timber Committee Website.

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6. Forest products markets

The year 1996 was marked by contrasts in the ECE region's forest products markets as the markets got back on track in the second half of the year and accelerated going into 1997. Record high pulp prices in 1995, driven by exceptionally strong demand in pulp and paper markets at that time, gave way to a downturn in forest products markets in latter 1995 and early 1996. As wide swings in stocks ended, markets in general returned to more normal levels, in line with steady long-term growth.

In 1996 *apparent consumption* of all forest products combined, fell in Europe and the Russian Federation by about 10 million m3. For Europe this was only a 2% decrease while for Russia because of the greatly reduced level of consumption, the fall meant a drop of about 21%. In contrast North American consumption increased slightly by 1.5%.

In 1996, *North America* experienced a significant upturn in housing starts in the United States and in Canadian too. This led to record domestic consumption of sawnwood and panels which balanced downturns in certain export markets, eg Europe. Consumption of paper and paperboard fell. Encumbered by continued weakness in the pulp and paper markets, the timber industry could not match the record profits in 1995.

In *Europe*, the first half of 1996 was a struggle to recuperate from the collapse of certain markets' demand at the end of 1995, while the second half-year witnessed a return of demand in some countries. Like North America, the European markets for roundwood, sawnwood and panels were dragged down by continuing weakness in the pulp and paper sector and its associated pulpwood requirements. The countries in *central and eastern Europe*, excluding the Russian Federation, showed some signs of optimism in forest products production, exports and consumption, but extreme variations exist.

The year 1996 was dismal in the *Russian Federation* as production disruptions (harvests and manufacturing) continued, export markets collapsed and domestic consumption sunk further. However there were some positive indications of increased exports and consumption in some of the other CIS countries.

Attention to *sustainable forest management* (SFM) is active, not only in the ECE region, but worldwide and it is having a direct effect on forest products supply and thus indirectly on markets. Traditionally forest management has been practised on a long-term sustainable basis in most parts of the region, but now forest managers are called on to prove it. The Timber Committee discussed the markets for certified forest products and the conclusions are presented elsewhere in this *Yearbook* and website.

Forest products markets in 1997 and 1998 were discussed at the October 1997 Timber Committee Session. European markets were recovering in 1997 from the lows in early 1996. Nevertheless, markets are still very competitive, with prices for some products under pressure, partly due to globalisation of markets. This is especially the case for some wood-based panels where overcapacity exists. North American market conditions were satisfactory and consumption rose in 1997 under the influence of a high level of housing starts. Markets in some transition countries have strengthened, while Russian markets were again marked generally by declines.

Sawn softwood markets in Europe ended their 2-year decline and consumption rose 4% and was forecast to remain steady in 1998. North American consumption rose to a new record level and was forecast to rise 2% more in 1998. Consumption in the Russian Federation fell 14%, but was forecast to regain that loss in 1998.

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7. Forest economics and statistics

One of the Committee's continuing responsibilities is to review and improve the international systems for collection and publication of statistics on the forest and forest products sector, as well as publishing its own databases and other publications. This task is delegated to the Joint FAO/ECE Working Party on Forest Economics and Statistics, which met in May 1997.

At this meeting, the Working Party:

- evaluated the fifth European timber trends study (ETTS V), made recommendations for follow-up, notably to put the ETTS V models on the Internet. This will be done in early 1998;
- reviewed the preparations for the Temperate and Boreal Forest Resource Assessment 2000;
- reviewed a draft study on non-wood goods and services, with case studies of 7 countries, to be published in early 1998;
- advised on the development of the Committee website.

It was also informed about intersecretariat cooperation in the field of forest statistics, through the informal intersecretariat working group, which brings together UN/ECE, FAO, EU, EEA, OECD and ITTO. One major achievement of the working group is the joint FAO/ECE/EUROSTAT questionnaire, whereby regular production and trade data are collected on a single questionnaire, with common definitions, and shared among the participating organisations, thus lightening the reporting burden on countries and improving the comparability of international data sets.

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8. Forest Technology, Management and Training

The Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training held its biennial session in Jönköping, Sweden in June 1997. In reviewing its strategy and how its programme is being implemented, it considered that it was successfully defining its unique position, in the field of operations, on the interface of research, practice and government, and that this aspect would become increasingly important as it became necessary to implement the broad policy directions emerging from the present intense consultation on sustainable forest management on the international policy field.

The Steering Committee reviewed recent achievements and developments in its field of interest and prepared proposals for its programme of work, including notably multiple use forestry, socio-economic aspects of sustainable forest management (see 9. below), including human resources requirements, employment, training, and safety in forest work, forest fires, forestry in areas contaminated by radiation, and reducing the impact of forest operations on ecosystems.

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9. Social Elements of Sustainable Forest Management in Europe
People, Forests and Sustainability

Since UNCED (Rio de Janeiro 1992), the perception has been growing that sustainable forest management (SFM) must be based on the three supports of environmental conservation, economic development and the needs of people. The third of these has received far less attention than it deserves. The Lisbon Ministerial Conference should be the occasion to complete the concept of SFM by strengthening the social pillar.

For the purpose of the report, the social elements of SFM may be broadly defined as those which involve two-way interactions or transactions between the forest and people, whether individuals or communities. These interactions may be direct: those between people and the forest itself, or indirect: those where the forest sector is an intermediary. By "forest sector" is meant all kinds of forestry activities, whether associated with wood production or other outputs and services, and downstream activities, notably wood-processing, that are dependent on the forest.

A close link exists between many of the social elements of SFM and the economic ones. Policies for strengthening the economic development of the forest sector are unlikely to be successful in the long run unless they take account of the social impacts and concerns. Likewise, environmental policies relating to the sector need to be integrated with both the economic and social elements. A full consideration of the three supports of SFM -- environmental, economic and social -- and their integration into practices at the management unit level will inevitably reveal a balance which depends on each particular case, at a particular scale. The need for trade-offs exists, and choices have to be made. Furthermore, far from operating in isolation from other sectors of the economy, the forest sector is strongly influenced by what is going on in them and by the public policies concerned with their development. Among the policy areas identified as having important impacts on the forest sector are economic growth, energy, environment, agriculture, trade and the role of the public sector, as well as demography and social affairs, land use, rural and regional development, industry and construction,

Society's interest in forests reflects the multiple individual and collective interactions between forests and people, which constitute a complex and dynamic process that changes according to society's economic, cultural and technological development. Many of the forest-related needs and demands of society identified in the report can be addressed through forest institutions within the national and local legislative and planning framework. However, some of these interests have to be dealt with in policies outside the forest sector. The Ministers responsible for forests need, therefore, to act on two levels. First, they should adapt their forest legal and planning framework, policies and strategies to incorporate the social elements more fully. Second, they should consider, together with their colleagues responsible for "externa" policies, how to coordinate and integrate policies to provide an appropriate answer to the forest-related interests, needs and demands of society.

The report sets out objectives and strategies in five main areas, which could constitute the foundation for an action plan for tackling the social elements of SFM within the areas of influence of ministries responsible for forests in Europe. The overall goal of this action plan should be to listen to people, re-establish their contacts with forests and trees, and create a climate of trust between forest institutions and people, the forest workforce and forest owners and managers.

Faced with external and internal dynamics, the forest sector should embrace change rather than engage in a losing battle to defend the *status quo*. There is ample evidence dut creative and open-minded handling can tum many of today's problems into opportunities.

To act effectively on the proposals outlined in the report requires coherence and a broad consensus on policy measures, programmes and investments as well as a medium- to long-term perspective. In order to arrive at coherent programmes and policies, more use should be made of regular national forest sector reviews as the basis for sector-wide strategies involving public as well as private players. In this connection, the fuller participation of women in developing and carrying out policies and strategies would undoubtedly be of benefit to the sector.

The proposed actions on social elements are mostly at the national level. Past experience and the proposals in the report demonstrate, however, that much is to be gained from cooperation within the European region. Emphasis should be placed on the exchange of experience with successful approaches and on the interface of policy, research, practice, education and training. Several regional institutions have a proven track record as being cost efficient mechanisms for international cooperation. These include the FAO European Forestry Commission, the UN/ECE Timber Committee, and in particular the Joint FAO/ECE/ILO Committee on Forest Technology,

Management and Training. As pointed out at the Strasbourg and Helsinki Ministerial Conferences, it is not necessary to create new international bodies within Europe to deal with the forest sector. Rather, the existing institutions should, with the support of Governments, be strengthened to carry out the task of promoting and implementing SFM, and they should adapt their programmes to cover new issues, as they arise.

In conclusion, the team of specialists expressed its conviction that the adoption and implementation of the recommendations contained in the report would be a major contribution to the widespread implementation of SFM in Europe and to maximizing the multiple benefits derived by society from the forest.

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10. Recycling, energy and market interactions

The team of specialists on Recycling, Energy and Market Interactions presented the progress of their work at the 1997 Timber Committee Session and were immediately asked to come back with their final report as the special topic of the 1998 Session (28 September). The Team's report will focus on the state of wood and paper fibre recycling and use for energy generation in Europe and North America and the implications on timber markets and forest management. The important influence of legislation to promote wood-based energy generation and recycling will also be highlighted.

The Team will hold a workshop on these same subjects in November 1998 in Turkey. More information is available through the secretariat or via the Timber Committee Website.

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11. Public relations in the forest and forest industries sector

In 1997, the Joint FAO/ECE team of Public Relations Specialists in the Forest and Forest Industry Sector published "Forest and forest products country fact sheets" (ECE/TIM/SP/12) through the Geneva Timber and Forest Study Paper series. The information is also available on the Timber Committee website.

The team met in Biri, Norway and launched a new study of the promotional activities of substitutes for wood, like plastics, aluminum, steel and concrete. The study will compare their campaigns with those of wood in order to improve awareness and to increase international cooperation among the forest and forest industries sector. A final report is expected for the parent bodies sessions in autumn 1998.

The team continues to focus on the communication opportunities brought about by the attention to sustainable forest management and they plan to participate in the Pan-European Process for the Protection of Forests in Europe at the Lisbon Ministerial Meeting in June 1998.

The team has also decided to organize an international forestry communicators forum, possibly in 1999.

More information on the team is available through the secretariat and will be eventually available through the Timber Committee website.

II. ACTIVITIES PLANNED FOR 1998 AND 1999

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

The Timber Committee's annual session

The Timber Committee meets annually in Geneva: its 1998 session is provisionally scheduled from 28 September to 1 October. The main items on the agenda are: support to UNCED and the pan-European process on the Protection of Forests; the forest resource assessment 2000, temperate and boreal zones; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under its auspices.

Timber Committee study tour
Forestry in border regions in northern Europe

At the invitation of the Finnish Ministry of Agriculture and Forestry and the Forest authorities of the Russian Federation a joint ECE Timber Committee and FAO European Forestry Commission study tour will be held from Saturday 24 to Monday 26 October 1998. The tour will depart from Joensuu (Finland) after a presentation of Finnish and Russian forestry cooperation in border regions and multilateral cooperation in northern Europe. On Sunday 25 October, participants will depart to Russia, where forest management aspects, logging operations and biodiversity matters will be presented. Return to Joensuu in the evening. On Monday the excursion will take place in the Joensuu region, with a presentation of local forest management and a comparison of biodiversity in Russian and Finnish forests.

Participation in the study tour will be open to representatives of the Timber Committee and the European Forestry Commission as well as representatives related to the forest and forest industries sector from member countries of the UN-ECE and other member countries of the United Nations. The number of participants will be limited for logistical reasons.

A detailed information note including a registration form can be obtained on request from the secretariat (see address on page iv) and posted at the Committee's Website.

Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

Forest technology management and training

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Joint Committee will hold its twenty-second session from 14-16 September 1998 in Zvolen, Slovakia in conjunction with the seminar on improving working conditions and increasing productivity in forestry. The Steering Committee will hold its fourteenth session most probably in June 1999 in France, in conjunction with the seminar on forest operations of tomorrow. The following seminars and workshops will be organized in 1998 and 1999 under the auspices of the Joint Committee:

1998

Title: **First Baltic Conference on Forest Fire**
Date: 4-8 May
Location: Poland

Objectives: To organize a forum on the forest fire problem in the Baltic Sea region, in which fire problems are entirely different from the Mediterranean region, and to activate the process of information exchange in fire science and management, and international policy development. To clarify the natural and cultural history of fire in land-use systems and wildfires. To present the state off knowledge of the impact of the modern industrial societies on forest fire, present new technologies and methods of forest fire management and discuss joint strategies.

Target groups: Government agencies, forest fire managers, research institute, and experts involved in forest fire prevention and control from the Baltic States.

Title: **Improving working conditions and increasing productivity in forestry**
Date: 9-12 September
Location: Banska Stiavnica, Slovakia

Objectives: West - East exchange of information on the close relationship between satisfactory levels of productivity and adequate working conditions. Discussion of cases which convincingly demonstrate that investments in a skilled and motivated workforce are indispensable for carrying out forest operations efficiently and profitably. The seminar will enhance the ability of governments and the private sector to integrate modern concepts of productivity and working conditions. These questions are of particular relevance for the countries in transition in order to ensure that restructuring and privatisation results in economic and social sustainability.

Target groups: Forest managers, contractors, representatives of employers' organizations (including contractors' organisations) and workers' organisations.

1999

Title: **Workshop on new trends in harvesting with cable cranes**
Date: June or September (to be decided)
Location: Ossiach, Austria

Objectives: To discuss environmental concerns and policy demands favouring the use of cable crane and winch systems, taking into account soil protection and road construction restrictions. Development trends of cable systems and methods: smaller, highly mobile units, running skylines, hydrostatic transmissions etc. and newly developed wire/cable products. Planning procedures. Co-ordination between cable system method, landings and road transport, between use of cable system and other

equipment and machinery and between use of cable system operations and multiple/recreational use. Training and safety aspects of cable system operators.

Target groups: Government agencies, forest managers

Title: **Seminar on Forest operations for tomorrow**
Date: 20-24 September
Location: Pessac, France

Objectives: To review developments for ecologically sound and sustainable forest operations in the short- and mid-term and provide a clear vision of the changes needed and approaches as how to implement them. The forest sector is confronted with increasing and sometimes contradictory demands concerning environmental functions, protection, recreation among others. At the same time the forest remains the most important source of renewable raw material. Certain changes are already taking place in the way the forest sector works, in a context of a growing global economy. The seminar will provide a forum for international dialogue and exchange of experiences to assure that changes are progressive.

Target groups: All forest professionals, forest owners, managers, forest industries, administrations and associations, research institutes and technology transfer and training centres.

Forest Economics and Statistics

The FAO/ECE Working Party on Forest Economics and Statistics meets every two years. It will hold its twenty-second session in Geneva from 26-28 May 1999. It will review the enquiry on the forest resource of the temperate zones, review the international forest sector statistical system and inter-organisation cooperation, and will adopt its programme of work for 2000-2004

Assistance to countries in transition of central and eastern Europe

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet in the second half of 1998, to ensure that it fulfils the expectations of this group of countries. The programme consists mainly in the organization of workshops, the following is scheduled:

- Workshop on Certification of sustainable forest management in countries in transition, Prague, Czech Republic, 30 August- 2 September 1998;

- Workshop on development of marketing of forest products in countries in transition, Minsk, Belarus, 15-18 September 1998.

Country profiles on transition countries of central and eastern Europe will continue to be published.

Outlook for the supply and demand of non-wood goods and services

A study on the outlook for the supply and demand of the non-wood goods and services of the forest will be published in 1998. The study was prepared as a framework for national studies, as a basis for national policies, and to develop methodology in the field.

III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/xx/x
Timber and Forest Study Papers	ECE/TIM/SP/x
Timber and Forest Discussion Papers	ECE/TIM/DP/x
Timber and Forest Information Series	ECE/TIM/INF/x
Timber and Forest Seminar and Workshop Proceedings	no symbol

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the *Timber Bulletin* in 1996 is set out in the bibliography.

The ***Timber and Forest Study Papers***, formerly publications in the ECE/TIM series, are composed of the European Timber Trends and Prospects Study (ETTS V), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the ***Timber Bulletin*** and the ***Study Papers***, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language. ***Timber and Forest Seminar and Workshop Proceedings*** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. Finally, the ***Timber and Forest Information Series*** which consists of this ***Timber Committee Yearbook***, plus ***Facts about ...*** the Committee and its two subsidiary bodies, which presents background information and activities of each of these bodies. A comprehensive list of publications appears at the back of this *Yearbook*.

Set out below are bibliographical references to those documents issued under the Committee's auspices in 1997 which may be of interest to experts in the forest and forest products sector.

Issues of the *Timber Bulletin* are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. **The documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Section secretariat (see address on page iv).

1. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

Report to fifty-fifth session of the Timber Committee (TIM/1997/4)
Report of fifty-fifth session of the UN/ECE Timber Committee (ECE/TIM/89)

2. MARKETS FOR CERTIFIED FOREST PRODUCTS

Report to fifty-fifth session of the Timber Committee (TIM/1997/2)
A summary of the presentations made at the fifty-fifth session of the Timber Committee, can be obtained on request from the secretariat

3. BALTIC COUNTRIES FOREST AND FOREST INDUSTRY STUDY TOUR

Report to the fifty-fifth session of the Timber Committee (TIM/1997/5/Add.1)

4. FOREST RESOURCE ASSESSMENT 2000 - TEMPERATE AND BOREAL ZONES

Report to the fifty-fifth session of the Timber Committee (TIM/1997/5/Add.3)

5. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the fifty-fifth session of the Timber Committee (TIM/1997/5)

Report on the implementation of resolution H3

Second Interim Report on resolution H3 of the Ministerial Conference on the Protection of Forests in Europe (ECE/TIM/DP/12)

Reports of the workshops organized in 1997:

New trends in thinnings, September 1997, Zvolen, Slovakia

Temperate and Boreal Forest Resources Assessment 2000 and criteria and indicators for sustainable forest management, October 1997, Gmünden, Austria

Development of marketing of sawnwood and value-added forest products, November 1997, Arkhangelsk, Russian Federation

Forest and forest products country profiles

Forest and forest products country profiles have published for the following countries in transition:

former Czech and Slovak Federal Republic	(ECE/TIM/64)
Romania	(ECE/TIM/65)
Hungary	(ECE/TIM/66)
Poland	(ECE/TIM/67)
Albania	(ECE/TIM/73)
Estonia	(ECE/TIM/74)
Bulgaria	(ECE/TIM/SP/1)
Slovenia	(ECE/TIM/SP/2)
Lithuania	(ECE/TIM/SP/3)
Ukraine	(ECE/TIM/SP/4)
Belarus	(ECE/TIM/SP/5)
Rep. of Armenia	(ECE/TIM/SP/8)
Rep. Of Moldova	(ECE/TIM/SP/13)
Russian Fed.	(ECE/TIM/SP/14)

6. FOREST PRODUCTS MARKETS

The *Timber Bulletin* consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Distribution and Sales Unit, Palais des Nations, 1211 Geneva 10, Switzerland (Fax N°: +41 22 917 00 27).

The contents of the *Timber Bulletin* in 1997, Vol. L, was as follows:

Title:	Issue:
Forest Products Prices, 1994-1996	ECE/TIM/BULL/50/1
Forest Products Statistics, 1992-1996	ECE/TIM/BULL/50/2
Forest Products Annual Market Review, 1996-1997	ECE/TIM/BULL/50/3
Forest Fire Statistics, 1994-1996	ECE/TIM/BULL/50/4
Forest Products Trade Flow Data, 1995-1996	ECE/TIM/BULL/50/5
Forest Products Markets in 1997 and Prospects for 1998	ECE/TIM/BULL/50/6

RELEVANT FAO STATISTICAL PUBLICATIONS

(available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 1995
State of the World's Forests 1998

7. FOREST ECONOMICS AND STATISTICS

European Timber Trends and Prospects: into the 21st century ,ETTS V (ECE/TIM/SP/11)

Report of the twenty-first session of the Joint FAO/ECE Working Party on Forest Economics and Statistics (TIM/EFC/WP.2/27)

8. FOREST TECHNOLOGY MANAGEMENT AND TRAINING

Report of the thirteenth session of the Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, Jönköping, Sweden (TIM/EFC/AC.1/20).

9. PEOPLE FORESTS AND SUSTAINABILITY

Report of the FAO/ECE/ILO Team of specialists on social aspects of sustainable forest management People, Forests ans Sustainability (ILO - Sectoral Activities Programme Working Paper)

10. RECYCLING, ENERGY AND MARKET INTERACTIONS

Report to the fifty-fifth session of the Timber Committee (TIM/1997/5/Add.2)

11. PUBLIC RELATIONS IN THE FOREST AND FOREST INDUSTRIES SECTOR

Report to the fifty-fifth session of the Timber Committee (TIM/1997/5/Add.4)

IV. LIST OF MEETINGS IN 1997 AND 1998

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other member countries of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists.

1998

Date	Location	Title
4-6 May	Sesimbra, Portugal	Team of specialists of public relations in the forest and forest industries sector (B)
4-8 May	Poland	First Baltic Conference on Fire (A)
30 August-2 September	Prague, Czech Republic	Workshop on Certification of sustainable forest management in countries in transition (B)
9-12 September	Banska Stiavnica, Slovakia	Seminar on improving working conditions and increasing productivity in forestry (A)
14-16 September	Zvolen, Slovakia	Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, twenty-second session (A)
15-18 September	Minsk, Belarus	Workshop on development of marketing of forest products in countries in transition (A)
28 September-1 October	Geneva	ECE TIMBER COMMITTEE, fifty-sixth session (A)
3-6 November	Turkey	Workshop of team of specialists on recycling, energy and market interactions (B)

1999

Date	Location	Title
April (to be decided)	Geneva	Meeting of the Timber Committee office holders and the EFC Executive Committee (B)
26-28 May	Geneva	Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-second session (A)
June or September	Ossiach, Austria	Workshop on new trends in harvesting with cable cranes (A)
20-24 September	Pessac, France	Seminar on forest operations of tomorrow (A)
27-30 September	Geneva	ECE TIMBER COMMITTEE, fifty-seventh session (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. **With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;**

2. **In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;**

3. **Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;**

4. **Carry out tasks identified by the UN/ECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;**

5. **It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.**

More information about the Committee's work may be obtained by writing to:

Timber Section
UN/ECE Trade Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org

Website address: http://www.unece.org/trade/timber

UN-ECE/FAO Publications

Timber Bulletin Volume XLIX (1996) ECE/TIM/BULL/49/...
Timber Bulletin Volume L (1997) ECE/TIM/BULL/50/...

1. **Forest Products Prices**
2. **Forest Products Statistics** (chronological series database, since 1964, also available on diskettes)
3. **Forest Products Annual Market Review**
4. **Forest Fire Statistics**
5. **Forest Products Trade Flow Data**
6. **Forest Products Markets in** *(current year)* **and Prospects for** *(forthcoming year)*

Geneva Timber and Forest Study Papers

Forest and Forest Products Country Profile: Russian Federation ECE/TIM/SP/14
(Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)
North American timber trends study ECE/TIM/SP/9
Long-term historical changes in the forest resource ECE/TIM/SP/10
European Timber Trends and Prospects: into the 21st century (ETTS V) ECE/TIM/SP/11
Forest and Forest Industries Country Fact Sheets ECE/TIM/SP/12

The above series of sales publications and subscriptions are available through national agents and booksellers (see next page "Order Form"), or through:

Sales and Marketing Section, Room C-115
United Nations
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0027

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Geneva Timber and Forest Discussion Papers *(original language only)*

Manual on acute forest damage ECE/TIM/DP/7
Interim Report on the Implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry) ECE/TIM/DP/12

ETTS V working papers:

Pajuoja, "The outlook for the European forest resources and roundwood supply" ECE/TIM/DP/4
Brooks, Buongiorno and Zhu, "Modelling forest products demand, supply and trade" ECE/TIM/DP/5
Buongiorno and Zhu, "Projections of forest products demand, supply and trade in ETTS V" ECE/TIM/DP/6
Brooks, "Forest resources and consumption of forest products in countries in transition, 1990-2020" ECE/TIM/DP/8
Imsrud and Vikinge, "Price trends for forest products, 1964-1991" ECE/TIM/DP/9
European forests and timber: Scenarios into the 21st century *(sold with ECE/TIM/SP/11)* ECE/TIM/DP/10
Peck and Descarpes, "The policy content for the development of the forest and forest industries sector in Europe" ECE/TIM/DP/11

Seminar and Workshop Proceedings *(original language only)*

- **Seminar on "Exploring multiple use and ecosystem management: from policy to operational practice", Prince George, Canada, September 1995**

International Forest Fire News *(two issues per year)*

Timber and Forest Information Series
Timber Committee Yearbook 1998 ECE/TIM/INF/5

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United Nations
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